



CI PREMIUM

REDEFINING THE BROADCAST INTEGRATION CLIENT

With clients across all verticals creating and distributing content, opportunities are no longer limited to traditional broadcast integrators.

By Tom LeBlanc



**Commercial
INTEGRATOR**

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IT'S EASY TO SEE WHY the broadcast integration market has changed dramatically over the past few years, because so has broadcasting. You can thank (or blame) YouTube for that.

Traditional broadcasting still exists, of course, and in fact it's broadening. Though viewership isn't what it used to be, there are more TV news programs and late night comedy shows on more channels than ever before. The difference is that you no longer need to be a traditional broadcaster to create and distribute content, and many integration clients are clamping on to that.

Synergy Media Group does a lot of broadcast projects, but not in what you'd call traditional settings, says president Bill McIntosh. The Pittsburgh-based integrator has a high concentration of higher education clients and McIntosh says demand for content creation, production and distribution tools related to distance learning is growing quickly. Meanwhile, corporate clients, or really "any company that's trying to become thought leaders in their industry," are turning to Synergy for help with video production.

Both broadcasting and "light broadcasting," as it's often called, are in high demand, according to CI Research's survey of 102 integrators. Among those that say they have done traditional broadcast projects in the past 12 months, 83 percent say that segment of their business will be stable or grow in 2013. Among those that have done light broadcast projections in the past 12 months, 77 percent expect that revenue to be flat or up in 2013.

Meanwhile, only 16.3 percent of surveyed integrators say they haven't done any light broadcast projects in the past

year, which begs the question of what exactly that term means. In addition to the higher education and corporate clients that Synergy sees, the light broadcast market includes large venue, K-12, government, hospitality and house of worship clients — any organization that wants to produce, manage and find ways to broadcast (albeit on a limited basis) their own video content. As a recording and streaming solutions provider, Haivision gets a window into the types of broadcast

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solutions being deployed in various markets, says chief marketing officer Peter Maag. "The higher education, healthcare and enterprise markets are looking for versatile, scalable systems that can handle multiple applications of video — broadcast video for internal use (what we call IPTV), video networking (moving video within the network) and enterprise communications (internal and external)."

Enterprises, he adds, "are embracing video for corporate communications, marketing and training applications." Meanwhile, "the healthcare industry is also producing, archiving and distributing video securely for remote clinical collaboration and education, which is helping to improve healthcare workflow, efficiency and patient care."

For integrators that already engage

clients in any of those markets, light broadcast can be a low hanging fruit of sorts.

Demand for Light Broadcast

Rob Ziv grew up in the broadcasting industry. His grandfather, Frederick Ziv, is known as the father of TV syndication for his work in the 1940s and '50s. Rob cut his teeth as a recording engineer in the '80s and has touched most aspects of broadcasting during his career. As business development manager at Almo Professional A/V, he's a uniquely equipped resource for integrators pursuing broadcast projects (see Ziv's column on p. 58). Through the Almo channel, he says, he doesn't see a lot of traditional broadcast projects, but he sees a whole lot of light broadcast applications.

The thing is, though, he doesn't like that term. "Quite frankly, I'd like to move away from it." It's the 'light' part that bothers him. These projects, he says, "have broadcast-quality equipment" and use a lot of the same production techniques and skillsets. The real differences happen "once the material leaves the production environment," Ziv says. "It's not necessarily being broadcast anywhere, maybe on the web." The better term "might be closer to 'narrow-casting.'" If anything, he says, "it's more of a light production environment than a light broadcast environment."

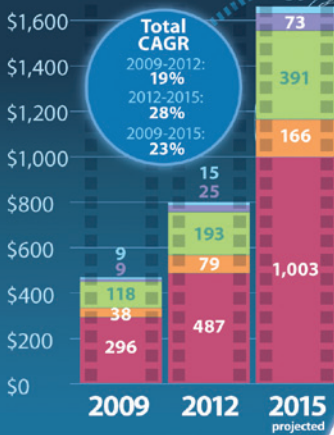
Whatever you call it, there is demand for it. "Right now we sell more studio cameras to churches than we do to TV stations," said John Rhodes, Panasonic's product line manager for system cameras and switchers, during a recent CI webinar.

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BROADCAST

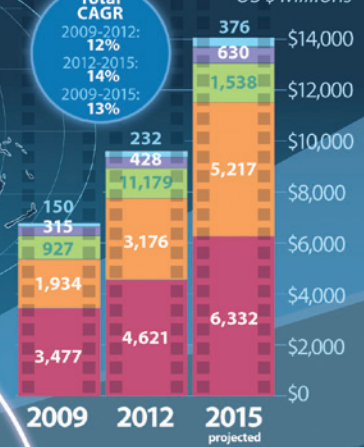
Global: Streaming Media & Webcasting Products

US \$ Millions



Global Customers: Others

Includes Broadcast, Cinemas & Transportation



Has your firm sought additional training on broadcast solutions in the past two years, in order to meet escalating demand?



In general, to what degree are you seeing commercial clients produce more video today than in years past?



Based on your experiences during the first two-thirds of this year — and your expectations for the balance of this year — how do you expect your traditional Broadcast and "light" Broadcast business to perform over the course of 2013?

Down from the level of 2012

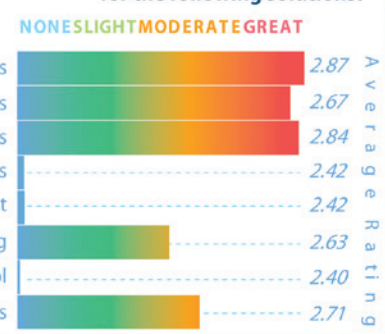
About the same as 2012

Up a moderate amount vs. 2012

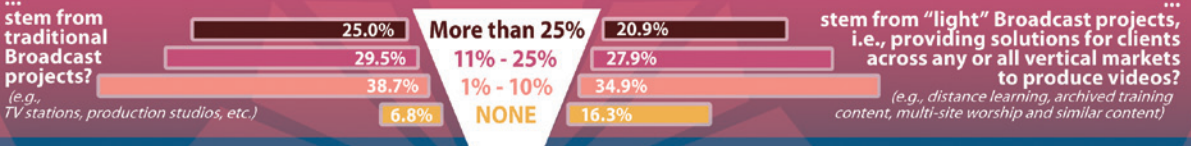
Up a great deal vs. 2012



How would you describe your traditional Broadcast and/or "light" Broadcast clients for the following solutions?



What portion of your integration firm's revenue over the past year do you estimate stem from traditional Broadcast projects? (e.g., TV stations, production studios, etc.)



What portion of your integration firm's revenue over the past year do you estimate stem from "light" Broadcast projects, i.e., providing solutions for clients across any or all vertical markets to produce videos? (e.g., distance learning, archived training content, multi-site worship and similar content)

SOURCE: EH RESEARCH

SOURCE: INFOCOMM/ACCLARO

SOURCE: EH RESEARCH

SOURCE: EH RESEARCH

SOURCE: EH RESEARCH

KVETA

Broadcast

CORPORATE RETAIL EDUCATION HOTELS & RESORTS RESTAURANTS & BARS

Indeed, 63 percent of surveyed integrators say they're seeing "moderate" or "great" demand for point/tilt/zoom cameras in broadcast or light broadcast applications; 71 percent for flat-panel monitors; 68 percent for microphones; 57 percent for specialized lighting; 54 percent for speakers; and 51 percent for consoles.

The products are just the tip of the iceberg. Synergy Media Group has been designing and building mini-studios for many higher education and corporate clients. "We're putting together 10x10 studios with high-quality broadcast cameras," McIntosh says, adding that the space-conscious clients are equipped with live streaming and playback.

Corporate clients are candidates for these mini-studios, but rapid adoption of distance learning has spurred even greater demand among higher education clients. "They want the CNN-type look, but any university space is very limited," McIntosh says. Synergy Media has been enlisted to carve out a small, professional space for professors to come in and record their sessions or stream live question and answer sessions.

Colleges, he says, are realizing that



"Right now we sell more studio cameras to churches than we do to TV stations," said John Rhodes, Panasonic.

distance learning provides a new revenue source and also creates the potential to enhance their reputations. "It opens up the opportunities to recruit students [globally] without visa issues. You're not lowering your standards, and you

can reach students you couldn't extract revenue from before." That very apparent return on investment, McIntosh acknowledges, makes light broadcasting for higher education clients a relatively easy sell.

BACK IN THE TRADITIONAL BROADCAST MARKET ...

THE GROWTH OF THE SO-CALLED light broadcast market isn't a robbing-Peter-to-pay-Paul type of situation. Traditional broadcast clients such as TV stations still demand cutting-edge solutions.

Broadcast clients have more options when it comes to distributing content and that provides opportunities for integrators. At the 135th AES Convention, October 17-20 in New York, many of the 60-plus training sessions dedicated to broadcast focus specifically on streaming content. David Bialik, CBS Radio project manager, is chairman of broadcast and streaming sessions at the event. "With Internet streaming broadcasters can do so much now — podcasts, stream audio, stream video or both to their targets."

Then there's the drive to improve on-set technology, and many TV stations that produce news programs are looking to add or update video walls, says George Edelmann, senior design representative for Oceanside, Calif.-based Broadcast Design International (BDI).

"High definition video walls are more requested than ever

before." What's interesting, he adds, is that the demand is trickling down to small, local markets. "The cost comes along with it. Everybody would like it, because it offers a lot of story-telling flexibility with digital content. It's just a matter of budgets, but it does get more limiting in smaller markets."

With costs continuing to shrink and innovation continuing to grow, traditional broadcast integration shows little sign of fading. InfoComm recently named broadcast as one of the fastest growing segments in the commercial integration market after health care. A year ago in its "AV Market Definition and Strategy Study," it predicts that the conversion to digital technology and HD will drive growth in the global broadcast market for the next five years.

Continual change is a recurring theme in the broadcast market, Edelmann says. "Technology is ever changing. In another five years we could be changing out from video walls to another type of source. It's always going to be about tools that bring stories to the viewers in a more dynamic way."

For clients whose space is even more limited, Synergy Media has even begun selling broadcasting carts. “We’ve been creating some mobile production facilities with high-quality broadcast cameras, mobile lighting, recording [etc.],” McIntosh says. “We just started it about six months ago and we’ve sold a few of them already.”

One post-installation challenge, however, is making sure the clients possess the technical ability to use the equipment. “You do need an operator,” McIntosh says, so these solutions “are usually going to clients with a firm technical staff. One company has an Emmy-winning director on staff, so they can handle it in house.”

That dynamic, of course, opens the door to potential service contract sales.

Becoming Broadcast-Ready

While many commercial integration clients are ready for content creation, production and distribution solutions, not all integrators are equipped to deliver what they need. Most non-traditional broadcast integrators will need to ramp up a little on basic video camera techniques, according to Niv.

“They’d need to get comfortable with specifying lenses, knowing what a [particular] lens is cable of doing versus another,” he says. Capturing content on camera requires a different perspective than integrators’ normal approach to displaying content. “It’s different than projection where you’re spitting something out. In this case, you’re picking it up. Lighting is critical as well.”

Still, Ziv doesn’t necessarily think most integrators require formalized training in order to provide these solutions. He recommends taking advantage of readily available manufacturer webinars and other resources. Panasonic, he points out, offers SKU-based system design and end-user training. “So if [an integrator] were trying to get into this environment and just wanted to put his toe in the water before making a big investment, you can now outsource [part of the design] to the manufacturer factory engineers. It’s a good way to see what’s required. Personally, I think that the fact that they’re

doing this opens the door to get more people into the market that might not otherwise be comfortable.”

To provide modern broadcast solutions, integrators need to be pretty network savvy, McIntosh says. “What you need is some major IT background. A lot of this stuff is about putting videos on networks and you need that IT knowledge. The [client’s] IT group doesn’t necessarily like extra things on their network, so you really need to be able to speak their language and make them understand that there won’t be security risks.”

The next step after storage is, of course, distribution. Clients have wide-ranging distribution goals, but McIntosh generally suggests that integrators partner with a content distribution or delivery network, “something that allows you to get their message out there and [is] viewable on all different types of devices.”

Newbie integrators may find broadcast workflows to be complex, says Maag, “especially if you are dealing with both live

and on-demand content for both local (facility) and broad scale (Internet) audiences. Integrators should consider minimizing the number of different vendors involved to assure the most successful system integration.

“They must also understand that they may be supplying a combination of hardware, software, and Internet services to provide an end-to-end system.”

As many changes as the broadcast integration market has seen, one thing hasn’t changed, according to CBS Radio project manager David Bialik, chairman of broadcast and streaming sessions at the 135th Audio Engineering Society (AES) Convention. That, he says, is clients’ commitment to quality. “The only advice I can offer is don’t cut corners,” he says. “Let’s say you go for less quality equipment or want to send out a lesser resolution — the audience is smart enough to notice it.”

For quality integrators, that’s a good thing. **CI**